

# CalTOP Training Manual Contents

## **Introduction 1**

Objectives 2

Before You Begin 3

Conventions in This Manual 4

    Graphic Assistants 4

    Text Assistants 4

What Is CalTOP? 5

    How CalTOP Works 5

    What Is the ASI TOPPS II Software Program? 5

    How ASI TOPPS II Software and the CalTOP System Work Together 5

    Benefits of Participating in the CalTOP Program 6

How Can I Get Help? 7

    Web Site Reference List 7

    Related Resources 7

## **Lesson 1: Getting Started 9**

Accessing the CalTOP System 10

    Logging On and Off of the CalTOP Server 10

    Changing Your Password 14

Using the CalTOP Navigation Bar 16

Understanding CalTOP Forms and Pages 18

    CalTOP Forms Explained 18

    Elements of Forms and Pages 19

    Required and Optional Form Fields 20

    Navigating CalTOP Forms and Pages 20

    Using Reference Information 21

Managing a Client File 22

    Creating New Client Records 22

    Determining if a Client Record Already Exists 25

Using Client IDs and Client File Number IDs 27

    Generating Client IDs 27

    Understanding File Number IDs 27

    Creating File Numbers 28

    Modifying and Deleting File Number IDs 30

Lesson Review 33

    Quiz 33

## **Lesson 2: Entering CalTOP Transactions 35**

Entering Data in Order 36

Using the Transaction List 38

    Using Transaction IDs 38

- Accessing the Transaction List Pages 38
- Receiving CalTOP Errors 42
- Entering Client Contact Information 44
- Entering Client Admission and Status Change Data 46
  - Using the Admission – California Only Form 46
  - Using the Admission Form 51
  - Using the ASAM/PPC II Form 60
  - Using the Episode Status Change Form 62
- Entering Client Treatment Information 68
  - Using the Treatment form 68
  - Using the Treatment – One Client Form 70
  - Using the Treatment – Many Client Form 73
- Lesson Review 77
- Quiz 77

### **Lesson 3: Working with Transactions 79**

- Submitting Records and Saving Working Copies 80
  - Creating Working Copies of Records 80
  - Assigning Transaction IDs to Records and Working Copies 80
- Locating and Modifying Records 81
  - Updating Records 81
  - Converting Working Copies to Records 84
  - Deleting Records 84
- Lesson Review 87
- Quiz 87

### **Lesson 4: Creating Reports 89**

- Using the Reporting Functions 90
  - Generating Reports 90
- Using the Crystal Reports Print Preview Window 96
  - Navigating the Print Preview Window 96
  - Using the Print Preview Toolbar 97
- Exporting and Extracting Report Data from CalTOP 98
  - Exporting Report Data 98
  - Extracting Data Files 99
- Lesson Review 102
- Quiz 102

### **Lesson 5: Using Delta Metrics (ASI TOPPS II) with CalTOP 105**

- ASI TOPPS II and CalTOP 106
  - Accessing ASI TOPPS II 107
- Exporting and Sending ASI TOPPS II Data to the CalTOP Database 111
  - Sending ASI TOPPS II Data to the CalTOP Server 111
  - Receiving ECXpert E-mail Receipts and Results 115
  - Batch Key Numbers 115
  - Troubleshooting ASI TOPPS II Data Exports 116
  - Viewing ASI TOPPS II Data in CalTOP 117
- Lesson Review 118
- Quiz 118

### **Appendix A: Frequently Asked Questions 119**

- Client-related Questions 120
- Form-related Questions 121

Report-related Questions 122  
Data-related Questions 123  
Security-related Questions 124

**Appendix B: Sample CalTOP Reports 125**

Web Submissions Report 126  
Batch Submissions Summary by Batch Key Report 127  
Batch Submissions Summary by Date Report 128  
Batch Submissions Detail by Batch Key Report 129  
Batch Submissions Detail by Date Report 130  
Roster of Active Clients by Client Name Report 131  
Roster of Active Clients by Client ID Report 132  
No Activity for Active Clients Report 133  
Level of Care Recommended vs. Received Summary Report 134  
Level of Care Recommended vs. Received Detail Report 135  
Service Summary for Active Clients Report 136  
Service Summary Detail for Active Clients Report 137  
Services Received vs. ASI Factors Report 138  
Episode Status Change Report 139  
Active Clients by Period 140

**Appendix C: Service Code-dependent Field Values 143**

Service Code-dependent Field Values 144

**Appendix D: Fields on Forms 149**

Valid Field Values 150  
    Client Information Form 150  
    Contact Form 152  
    Admission – California Only and Admission Forms 152  
    ASAM/PPC II Form 160  
    Treatment Forms 162  
    Episode Status Change Form 163  
Required Field Values for Codependent Records 167  
    Admission – California Only Form 167  
    Admission Form 167

**Appendix E: Error Messages 169**

Client-side Errors 170  
    Admission Form 170  
    Admission - California Only Form 183  
    ASAM/PPC II Form 190  
    Client Add Form 192  
    Client Find Page 193  
    Client Information Form 193  
    Client Update Page 194  
    Contact Form 196  
    Episode Status Change Form 197  
    File Number Add Form 200  
    File Number List Page 201  
    File Number List Detail Page 201  
    File Number Update Form 201  
    Forms Page 202  
    Provider Profile Page 203  
    Reporting Page 203

Report Selection Criteria	Page 203
Transaction List	Page 205
Transaction List Detail	Page 205
Treatment Form	206
Treatment - Many Client Form	207
Treatment - One Client	209
Validation Errors	211
Client Information	Page 211
File Number List	Page 211
Forms	Page 211
Transaction List	Page 212
Server-side Errors	213

**Appendix F: ECXpert Certificate Exchange 231**

Why You Should Exchange Certificate Information	232
Exchanging ECXpert Certificates with ADP	233
Sample E-mail Messages	244
Sample Message 1	244
Sample Message 2	245
Sample Message 3	246
Sample Message 4	247

**Appendix G: Inbound ASCII Files 249**

Sending Data in ASCII Format to CalTOP	250
Processing Tips	252

**Appendix H: CalTOP Provider Setup Procedures 255**

Setting Up Your Computer	256
Getting Your Verisign Certificate	262

**Glossary: page 263**

**CalTOP Training Manual Index: page 265**